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REPORT


MANAGEMENT IMPROVEMENT PLANS

SAN JOSE, CALIFORNIA

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MANAGEMENT IMPROVEMENT PLANS

CITY OF SAN JOSE, CALIFORNIA

Griffenhagen-Kroeger, Inc.

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Prepared by

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December 1970

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INTRODUCTION

Upon the recommendation of the City Manager, the City Council authorized in August 1970 a diagnostic study of the City government organization and management. The purpose of this study was twofold:

1. To make a reconnaissance study of the City government operations and to report the observations made as a guide for any future improvement programs that the City Manager might wish to undertake with the concurrence of the City Council.
2. To specifically identify the more significant management improvements that might be undertaken and to provide plans for their accomplishment.

This report provides these potential management improvement plans. A second report entitled Observations on the Organization and Operations of City Government of San Jose has been concurrently submitted and summarizes the results of the reconnaissance study.

To avoid what would be inappropriate conclusions or inferences that the City government has not fully met its responsibilities to provide effective services or that substantial corrective action is required, we must preface the text of this report with these qualifying remarks:

1. This is, to our knowledge, the first comprehensive examination of its kinds that the City has undertaken. It is therefore inevitable that some potential for improvement might be found.
2. The City has undergone a phenomenal growth in population that, in turn, has resulted in an unprecedented increase in required services. Without competent leadership such growth might have resulted in dysfunction of organization and management structures. Instead the City government has rather consistently kept pace with that growth despite rather limited financial resources.
3. Drawing upon many years of consulting experience we can state that the problems encountered and the number and nature of the recommendations being made are not unusual for an organization of the size and complexity of this City government.
4. While the City has appropriated resources for operations and services in a relatively direct proportion to requirements, this has not been the case regarding the provision of adequate staff to continually deal with the problems of management improvement and evaluations of service effectiveness. One conclusion we draw from this study is that the existence of an adequate and competent staff of analysts, both at the department or the City management level, dedicated to a continuous program of management and systems evaluation, would have materially reduced the number of recommendations that it has been necessary to make.

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While recognizing the City government's past achievements, we suggest that it is nevertheless the time to consider a greater allocation of resources to strengthen the management processes of the City and to improve the organization and functions that have been created under the pressures of over two decades of unusual growth and development. The recommendations in this and other reports emanating from the study are a first step toward that improvement. The objective of any improvement program is not necessarily that of saving money, although hopefully this may be a by-product. A principal objective of our effort has been to suggest better ways of providing more effective services with present resources.

The improvement plans contained in this report may take a combination of in-house staff and consultant assistance. This is not because the expertise does not exist in City government to do the work but because the priority for action and the scope of the work involved would mean an almost total dedication of City staff analysts for an extended period of time to the exclusion of all other ongoing work. Such dedication of time may not be feasible considering the relatively small number of analysts available and the almost continuous generation of both management and systems problems that must be solved by the present staff.

The more significant organizational and systems problems resulting from the reconnaissance study are listed below. The first four items have a high priority with the first two being requisite to the successful implementation of almost all other studies being proposed. The remaining items should be accomplished as money and staff resources to do the work become available.

1. Upgrade data processing equipment and procedures in an interim action pending a long-range MIS development.
2. Begin the development of a comprehensive computer-based information system with a Phase I exploratory study.
3. Conduct a major overhaul of the City's accounting systems including the completion of initiated but uncompleted work on the development of a chart of accounts.
4. Develop improved payroll, labor distribution and position control systems.
5. Develop an improved budget preparation and control system.
6. Conduct a study of the feasibility of consolidating all protective inspections in one department.
7. Conduct a feasibility study of creating a Department of Central Services.

8. Conduct an equipment management study. This study is related to number 7 in that equipment management is proposed as a function of the Department of Central Services. However, there is an urgent and independent need to review the management of the acquisition and utilization of City equipment whether or not study number 7 is undertaken.
9. Conduct a records management study. This study is also related to number 7 for the same reasons above but also deserves independent analysis.
10. Study the feasibility of consolidating the City and County civil defense programs.

The following sections of this report describe the study plans to accomplish needed improvements. These plans are numbered to correspond with the above list of actions to be taken.

IMPROVEMENT PLAN # 1

A STUDY FOR THE INTERIM IMPROVEMENT OF THE CITY'S DATA PROCESSING SYSTEM

The reconnaissance study of the data processing operations and of the information requirements of other departments has produced support for what is already known--there is a critical need to begin a long-term effort to develop a comprehensive computer based information system. Whether or not this effort is undertaken, there is an imperative need to develop a short-term plan to meet present and immediately foreseeable data processing requirements and to implement that plan without delay. The present operation is in difficulty due to a number of reasons including the need for procedures and equipment improvements. Short-term solutions are needed to maintain present processing operations at acceptable levels of effectiveness.

The City's auditor (Ernst & Ernst) indicated in a report dated September 1969 that data processing equipment usage had increased to 100% of the available time under the assumption of 80% efficiency. However, the adequacy of even this level of processing is questionable. The increasing volume of record unit processing, and lack of adequate data processing capability are restricting the development of badly needed accounting systems such as chart of accounts revision, fixed assets, and capital project accounting and many other systems now on the priority list of the Accounting System Improvement Project (ASIP). The data processing system as it is now operating cannot cope with the current and increasing workloads and certainly cannot wait for a long-range study of overall City EDP requirements and, under current conditions, new applications in other areas would be close to impossible to achieve.

We list some of the deficiencies of the present data processing system:

1. No on-line storage.
2. No random access capability.
3. No fast access. (It is necessary to process large sequential decks of cards to obtain statistical information or update existing information.)
4. Punch-card and manual manipulation is awkward and time-consuming and an increasing volume is compounding the situation.
5. An outdated system of payroll processing alone uses 59% of the machine time and involves the manipulation of 150,000 cards.

6. The computer is now operating 11 hours per day. Although a second-shift operation may help, it will involve study and revisions of control and balancing procedures and even with improvements a second shift may not materially add to the system capacity.
7. The existing IBM 360/20 computer has a limited 8K-core storage and is exclusively punch card oriented. The major storage of data is contained in decks of punch cards and the production efficiency is restricted by manual and mechanical manipulation of card decks. Also, the small core capacity does not permit adequate statistical accumulation.

In a letter to the City Manager dated June 17, 1970, the Finance Director outlined the problem and presented a proposal for upgrading the existing equipment. Although the proposed additional equipment, resulting in a yearly expenditure increase of approximately \$60,000, would certainly help, it may be only one of several alternatives available for short-term improvements.

In view of the cited problems, we suggest that a study be made to determine the optimum method of meeting current and imminent requirements. It is anticipated that if a long-range City-wide study plan is undertaken, it will involve a period of at least two years of in-depth study design and development and a third year of phased implementation. This suggests that an interim plan must provide service for three years in order to meet current expanding requirements and parallel long-range implementation. Such service cannot be expected of the present system.

This proposed study would be generally directed toward detailing several alternative methods for solving the City's present EDP problems and specifically the study should produce:

1. Alternative solutions consisting of combinations of:
 - Equipment acquisitions--upgrading or peripherals.
 - Revised procedures.
 - Revised software.
2. An implementation plan consisting of time-phase-cost schedules for each alternative.
3. Staffing and training implications of upgrading the system.
4. Effect of an improved system on present applications and the potential for limited additional applications in the interim period.
5. Required organizational changes.
6. System relationships (if any) to the Public Works Department Model 1800 computer.

Although the major intent is to provide the data processing section with the capacity to satisfy current requirements prior to implementation of a long-range City plan, cost savings, benefits, and minor new systems development will be considered. It should also be possible to design the interim system so that it might serve as a peripheral portion of a future computer configuration.

Normal practice would suggest that this kind of study be conducted in-house; however, our review of City staff and work assignments suggests that it would be difficult to find the expertise or time to conduct the work.

We estimate that it would take one analyst approximately 15 working days (plus a few days for documentation) to complete the work. This time does not include implementation and conversion time. If a consultant is to do the work some in-house staff assistance would be needed consisting of some time on the part the Assistant Director of Finance, Supervisor of Systems and Cost Accounting, and Supervisor of Data Processing. We estimate that implementation of an interim system may take from six months to one year. We therefore suggest that it is advisable to take action on this study as soon as possible if the interim system is to have an optimum life before any long-range plans can be effected. We estimate a cost of between \$4,000 to \$5,000 for consultant assistance.

IMPROVEMENT PLAN # 2

EXPLORATORY MANAGEMENT INFORMATION SYSTEMS STUDY

The present data processing operation in the Finance Department does not meet all the requirements of an integrated and effective system. Although using a small IBM 360 computer, both the equipment configuration and the system design are locked into an outdated unit record or punch card approach. The sheer volume of information requirements in a city the size of San Jose makes this type of operation inadequate. A sophisticated large-scale communications-oriented computer installation, will be eventually required, however, merely providing for the upgrading of the existing equipment and procedures would not provide an immediate answer because it would not be operating within a comprehensive system.

A City-wide MIS study is required to determine the operational and management information needs that would form the basis for the design of an integrated information system for all departments; to design interface systems with other government agencies; and to program, implement, and document all of the procedures. This kind of a study is mandatory if the City is to progress. However, we believe that such a study would be financially and administratively imprudent without a preliminary effort dedicated to the development of a more precise plan and the exploration of available options.

We are, therefore, proposing an exploratory MIS study which will involve the:

1. Determination of the probable City-wide information applications and estimated volumes.
2. Exploration of the organizational implications of the total system.
3. Estimation of the resources required to develop a City-wide information system.
4. Determination of the benefits to be derived from such a system.
5. Establishment of a tentative time-phase schedule for accomplishing a system.
6. Identification of feasible options that promise the greatest return for the developmental expenditures.

It should be noted that because it will be necessary to go into sufficient depth to determine the benefits to be derived from a City-wide information system, this initial study will, in fact, become a modular first-phase of a long-range MIS development plan. This approach will permit the City management an opportunity to evaluate cost performance and benefits and make necessary trade-offs prior to making a decision to commit extensive resources to the design, development, and implementation of a City-wide MIS. Such a commitment might involve well over \$1,000,000 and three or more years of effort.

Exploratory MIS Study Resources

It is estimated that this exploratory MIS study will require a calendar period of approximately 6 months and require the following present City staff input:

1. Systems and procedures analyst staff - 60 man-days.
2. Financial systems and cost accounting staff - 60 man-days.
3. Other Finance Director's staff - 30 man-days.

The staff of other departments will be required to assist in data collection and to attend planning discussions but the time expenditures should not be significant.

It is estimated that consultant effort over the six month calendar period will involve the following:

1. Senior information specialist (project manager) - 90 man-days.
2. Systems analysts - 90 man-days.

The cost to the City would be approximately \$40,000 to \$50,000.

Results

In addition to the exploratory study content cited above, the following items should be delivered:

1. A list of potential information systems applications, including estimated present processing costs, potential improved information systems costs, and an explanation of both tangible and intangible benefits.
2. Estimated application design and implementation time schedule.
3. Estimated staffing requirements.

4. Estimated computer equipment requirements.
5. Report on the implications of a management information system on the City's organization structure, services, personnel, decision processes, and administration.

A composite of the above items will be used to evaluate the advisability of developing a City-wide MIS and serve as a part of a long-range MIS plan.

IMPROVEMENT PLAN # 3

COMPLETION OF CHART OF ACCOUNTS AND ACCOUNTING AND BUDGETARY CONTROL SYSTEMS IMPROVEMENTS

Without an increase in present staff it is doubtful if this improvement plan can be accomplished with strictly in-house resources. Work has been underway on an Accounting Systems Improvement Project (ASIP) for over a year and progress has not been as great as expected due to a number of causes including interruptions by requested cost analysis studies. Either the priorities for the current staff need to be changed, new staff added to the Systems Unit, or a consultant retained to do all or part of the work. The accounting systems work of highest priority is:

1. Revision of chart of accounts.
2. Improvement of the following sub-systems:
 - a. Expenditure accounting
 - b. Revenue accounting
 - c. Inventory control
 - d. Fixed assets accounting and control
 - e. Capital projects accounting and control
 - f. Deposit, trust and agency accounting
 - g. Debt service accounting

A second level of priority should be given to:

1. Designing a City-wide work order system.
2. Preparing and maintaining a comprehensive City accounting manual.
3. Revising and improving reporting methods to conform to new accounting systems.
4. Designing an improved payroll system (a part of a larger Improvement Plan # 4).
5. Designing a computerized general ledger system (a part of Improvement Plan # 1 or # 2).

The first priority items would require the equivalent of five full-time analysts for a period of about 10 months for design and implementation and consulting assistance of approximately two to three man-months or any combination thereof. The second priority items can become continuing systems work and, in the case of items 4 and 5 above, these would be accomplished as a part of other improvement plans which have already been given high priority status in another section of this report.

IMPROVEMENT PLAN # 4

DEVELOPMENT OF AN IMPROVED PAYROLL, LABOR DISTRIBUTION AND POSITION CONTROL SYSTEM

There is need for an improvement in payroll preparation and labor distribution systems. Some aspects such as procedural and processing improvements would be considered if Improvement Plan # 1 were undertaken. The information requirements for long term improvement would be considered as a part of Improvement Plan # 2 and, as a supplement to that proposed study, an immediate effort to implement designed improvements could be undertaken subject to the extent of any upgrading of the present data processing equipment configuration.

If Improvement Plans # 1 and # 2 are not undertaken in the near future then some short-term improvements should be made. These improvements should include these general areas:

1. Eliminate duplication in the preparation and checking of payrolls between the operating departments and the Finance Department.
2. Provide for a system of "exception" reporting and direct transmission of checked and approved source documents from the departments to the EDP unit.
3. Provide for audit control of the "exception" system during computer processing.
4. Design and produce at least these reports (in addition, of course, to payroll, overtime and other warrants):

Allocated Position Master Record

Payroll Master Record

Payroll Maintenance Reports (changes in status, pay, withholding, etc.)

Payroll Register

Compensatory Time, Sick Leave, Vacation, etc. Report

Quarterly Earnings Report

Annual Employee Earnings Record

FICA and IRS Form W-2 (if appropriate)

Retirement Systems Registers and Reports

There, of course, needs to be a system for labor distribution to project and/or object accounts; however, these systems cannot be completed until the chart of accounts and accounting systems improvement take place (Improvement Plan # 3).

Any improvements to the current payroll system should be undertaken with a conscious consideration of the relationship of these improvements to a comprehensive personnel information system. Such a system would be one of the products of the long-range MIS design and implementation effort, the first phase of which would be accomplished through Improvement Plan # 2. In this first phase the following analyses should be made:

1. Review the present personnel information system with particular emphasis on those aspects of the system that produce information for the payroll and related accounting.
2. Identify the informational requirements of all concerned departments.
3. Identify the subsystem blocks of a total personnel information system and the relationships between blocks.
4. Identify the probable content of source and processing documents that will be required along with transaction volumes.
5. Prepare a preliminary design of the flow of payroll and related information through the various departments for the purpose of establishing general design criteria for a payroll subsystem.
6. Identify requirements for the review and control of a payroll and related accounting systems.
7. Prepare a catalog of required information elements for the purpose of the design of files and input and output procedures.
8. Prepare a processing demand list for the use of computer and peripheral equipment to determine processing time requirements.

To accomplish the design work for a short-term improvement effort (exclusive of implementation and the development of forms and procedural specifics) we estimate that 25 man-days will be required plus approximately 10 days for documentation. If the Finance Department systems staff can be freed of other effort, they should be able to accomplish the task with help from the City's programming staff. The cost for outside assistance to complete the work would be approximately \$7,000 to \$10,000.

IMPROVEMENT PLAN # 5

IMPROVEMENT OF THE BUDGETING PREPARATION AND CONTROL SYSTEMS FOR MUNICIPAL OPERATIONS

A budget system for a fully articulated municipal organization may be designed to perform on any of several levels of sophistication. These may include (1) a budget prepared to reflect line-item expenditures by organizational unit, (2) a budget showing object expenditures by program unit, (3) a budget designed to reflect expenditures as related to the work output by program unit, or (4) a budget intended to reflect expenditures by program effort in terms of responsibilities and goals to be met. Whichever type of budgeting approach may be adopted certain elements are basic and indispensable:

- An adequate data base from which to draw rational estimates and projections.
- A practical framework and format for presenting budget elements for analysis, review and approval.
- An appropriate system to implement budget decisions.
- A practical system to provide for the timely monitoring, control and evaluation of budget expenditures and commitments.

The budget of the City is designed as described under (3) above and, as such, represents a level of sophistication that is not found in most local government budgets in California. The staffing, fiscal, and workload problems which impede the development of other administrative systems of the City also impede the further development of the budget process. The following are areas in the budget process which can be improved:

1. While the budget is designed on a work program basis, budget proposals are not always related to work units. Appropriations are made on a lump-sum basis in the three major categories of personal services, non-personal expenses, and equipment, rather than by work program. This process permits transfers of money between programs throughout the year. The magnitude and frequency of such transfers indicates a possible need for more detailed program planning at the department level.
2. Reporting systems at the departmental level that indicate work program status are limited, which impedes measurement of budget balances and schedules.
3. The work order system of the City is not comprehensive and not fully integrated with the total budget process.

4. The City Manager's office exercises some controls over the departments for minor expenditures that may not be necessary with the result that actions may be held up awaiting approvals.
5. There is substantial variance in the Capital Improvement Program accomplished in a fiscal period, contrasted to the Capital Improvement Program originally proposed. Most variances are occasioned by actions beyond City control. Other variances, however, can be reduced or eliminated by improved cost estimation, clearer setting of priorities, improved coordination of planning and execution, greater management continuity and centralization of responsibility.
6. The limited management information system of the City has fostered the development of duplicate appropriation and expenditure accounts in most departments.
7. The use of cost/benefit analysis of new or existing programs or requests for personnel or equipment should be expanded.
8. Measurements of program effectiveness throughout the City are now basically judgmental. The budget process should be revised to include quantitative measurements of program effectiveness where possible.
9. Insufficient controls exist for auditing the appropriateness of Capital Improvement charges against appropriation or Bond accounts. While this comment relates primarily to Finance Department and Auditor's Office responsibilities, such controls are essential to the effective implementation of the budget.
10. The budget for many individual departments does not totally reflect actual costs of operations because of services received from other departments or charged transfers between departments that do not reflect actual costs.

We recommend that a two year program be undertaken to improve the budgeting system; the first year devoted to devising management and procedural improvements, and the second devoted to implementation and trial. The third year should see the program in operation. Excluding implementation and test, we see the effort being expended in five broad areas. These areas and tasks related to them are as follows.

Developing An Adequate Data Base

All of the budget elements and the decisions made in relation to them must be founded on the best available experience and data. To develop a data base the following should be accomplished:

1. Development of systems and data bases for estimating costs, e.g., standardized price lists for frequently purchased items and formal methods for obtaining estimates for non-routine items, capital outlays, inter-departmental service charges, indirect costs, and personnel costs.
2. Revise the chart of accounts (see Improvement Plan # 3) as one base for a better documentation of costs as well as for control purposes.
3. Improve the development of financial transaction data and fiscal information reporting and dissemination.
4. Develop realistic cost centers and cost accounting systems including revolving or working capital funds for equipment or services provided to several departments.
5. Develop data base systems for individual departments and the necessary elements for continued production, and eliminate duplications. These systems would eventually become files and records in a computer-based data bank.

Develop A Budget Framework And Formats

The budget should reflect proposed expenditures in terms of authorized programs, additional requested programs and requested one-time outlays. These requests should not assume that the prior year's program is automatically justifiable but rather that each element is to be rejustified along with any necessary modifications.

An appropriate format in which these proposals are presented will contribute to the uniformity, completeness and potential for a systematic evaluation of each department's budget submittal. The work entailed in this phase should include the following:

1. Review of the present budget construction for completeness and effectiveness in transmitting management policies.
2. Evaluation of the format by which proposed expenditures are identified as (a) currently authorized or mandatory to meet previous service-level commitments, (b) expanded to meet new workloads under existing program commitments, and (c) expanded to meet new program needs following policy approvals.

3. Evaluation of the means by which workload data are generated and made pertinent to the budget estimates.
4. Review of the departmental documentation of elements of costs generated by services of other departments.
5. Review of the means by which and extent to which budgeting activities for complementary or related functions are geared to one another.
6. Preparation of the procedures by which amended budgets can be generated as required by the budget process.

Budget Implementation Functions

Because the effectiveness of operations relates so closely to the proper management of the budget, the analysis of the budgetary processes must include a review of the way in which all levels of the City organization participate in the expenditure of funds. Such a review ought to consist of at least the following:

1. A review of the means by which budget decisions, respecting related functions, are coordinated.
2. A review of the methods by which budget decisions are communicated to the levels of the organization ultimately responsible for implementation, and the manner in which the implementation is audited.
3. A review of the procedures related to implementing the adopted budget, including allotments, tentatively approved items for later final action, etc.
4. A review and evaluation of appropriateness of the organization and systems engaged in the implementation process.

Control And Evaluation Of Budget-Related Actions

It is not enough to be satisfied that the decisions made prior to a fiscal year respecting that year's expenditures are properly implemented. Because the conditions respecting anticipated needs may change within short time periods, certain budget implementation actions must be reviewed again before actual expenditure commitments are made. It is also important that analysis of the effectiveness and beneficial results of expenditures be reviewed throughout the budget year. A program of evaluation in this area should include the following:

1. A study of the work program assignments and measures of accomplishments as they relate to program expenditures.
2. An analysis of the means by which City and departmental managements monitor budget implementation decisions and effect timely changes in activity as required.
3. A review of the means by which policy groups including the Council and the public may be alerted to mid-year modifications requiring their involvement.
4. A review of the means by which longer range implications of budget decisions are assessed and may be used in policy determination.
5. An assessment of the effectiveness of budget management reporting systems at City and departmental administration levels including the extent to which EDP is or can be employed.

Anticipated Improvement Plan Results

The proposed evaluations will result in a number of outputs which should aid in achieving changes or improvements in the present budgeting processes. Recommendations in each of the four areas identified above should be produced.

The recommendations should be tailored to the production of a budget document having at least the following features:

1. An overall analysis of the City's economic position and the effects in this context of the estimated and proposed revenues and expenditures for the ensuing year.
2. Analyses of the long-range implications of new or altered revenue or expenditure patterns, legislative actions, and other developments impinging on the City's ability to finance its programs.
3. Display of pertinent program information designed to support recommended expenditure levels.
4. Clarification of legislative options and their consequences and alternatives.

These features are now to be found in the City's budget but they can be improved in content. To a considerable extent the improvement will depend upon the development of a more sophisticated computer-based information system.

The recommendations should also include:

1. Proposals for the accounting systems for each program category that will represent good accounting practice and provide adequate management controls. These systems should be designed in anticipation of a high degree of future automated data processing.
2. Proposals as to the staffing and functional assignment for budget preparation, review, evaluation, implementation and control.
3. Proposals for the scheduling of various budget related activities to effect improved budgetary and operating procedures.
4. Proposals for economies of operation.

Study Resources And Time Requirements

If this study is undertaken with in-house staff we estimate that the staff requirements will be:

Senior-level budget analyst	-	20 man-days
Budget analyst	-	20 man-days
Fiscal systems analyst	-	<u>20 man-days</u>
Total		60 man-days

Ideally, the study should be timed concurrently with chart of accounts and accounting systems improvement efforts. Or, at least, the anticipated accounting system redesign plan should be available.

If City staff time is not available, or not available to the extent needed, a consultant could provide assistance to a City staff or conduct the entire design effort. If the latter option is selected we estimate a study cost of approximately \$12,000 to \$15,000 exclusive of implementation or conversion efforts.

IMPROVEMENT PLAN # 6

A STUDY OF THE FEASIBILITY OF CONSOLIDATING ALL PROTECTIVE INSPECTIONS IN A DEPARTMENT OF INSPECTION SERVICES

The reconnaissance study identified several units in the City service structure concerned with conducting inspections and enforcing programs relating to the building, occupancy, and use of private structures within the City. These include the Building, Fire and the Housing and Community Development (Health) Departments. Some related field activity also exists in the Planning Department as well. With the exception of the Fire Department, the core of inspectional activity is performed in the Building and the Housing and Community Development Departments, and we suggest that a proposed study encompass the operations of these two departments. The purpose of the study would be to determine the feasibility and desirability of forming a consolidated Department of Inspection Services. We propose excluding the fire inspection program from this study because of the traditional association this program has to other aspects of the fire protection services.

The departmental units that would be involved in the study are as follows:

Building Department:

- Building Division
- Electrical Division
- Plumbing Division
- Plan Check Division

Housing and Community Development Department:

- Code Enforcement
- Nuisance Abatement
- Refuse Disposal Contract Administration

The suggested study should take the approach that inspection services are a tool to aid in maintaining appropriate City-wide environmental standards and not merely a means of exacting compliance with the law. This approach would provide a perspective which could, at some future date, permit the inclusion of additional environmental improvement services in a consolidated department. This report presents some potential advantages of undertaking partial or full organization consolidation of inspectional services performed with respect to private properties by the City. We have also outlined a series of tasks that need to be undertaken as a part of this feasibility study, and we have estimated the time and cost associated with this effort.

Potential Advantages Associated With Creation Of A Proposed Department Of Inspection Services

The following are potential advantages that may be realized from a consolidation of inspection services should such a program prove feasible:

1. Unification of the direction of all inspectional efforts and the translation, through one administrative structure, of the council and managerial policies affecting inspection and enforcement.
2. Development of a uniform application of codes through a single departmental philosophy of inspection.
3. Improved workload programming.
4. Improved staff utilization.
5. Improved opportunity for training of staff in more than one inspectional speciality.
6. Possibility of creating a promotional class of generalist inspector qualified in several disciplines.
7. Elimination of duplication, loss of time, and other expenses resulting from separation of agencies having related responsibilities.
8. Development of a coordinated case handling system resulting in consolidated records and improved operating and management information.
9. Provision of unified and less complicated appeals procedures for the public.
10. Provision of "one-stop" service to the public to a greater degree.
11. Establishment of programs and priorities that are better related to the overall goals of the inspectional and enforcement effort.
12. Development of a more unified and comprehensive approach to overall community planning.
13. Provision of a single unit to interface with private agencies and other public agencies.

14. Provision of a structure which can be enlarged or contracted according to legislative determinations and external conditions, with improved personnel transfer opportunities.
15. An improved ability to establish systems and controls, concerning such activities as fee collection and plan checking to improve and expedite service to the customer.
16. Reduction by one in the number of departments reporting to the City Manager.

Recognizing that the validity of the proposed advantages has not been established, a program of inquiry is proposed to assist in testing the feasibility and value of consolidating inspectional services. The results of such a study program should be as follows:

1. A statement of the mission and objectives of centralized management and direction of inspectional services in the City.
2. An in-depth statement based partly on reconnaissance level investigations and partly on additional data collection to present and evaluate the current organizational and operational arrangements in each related inspectional unit.
3. An analysis and proposed program of improvements for the following elements of inspectional services:
 - a. Organizational placement, management, direction, and coordination.
 - b. Staffing patterns (including the review of the position classification structure).
 - c. Public relations procedures including a review of appeals mechanisms and enforcement systems.
 - d. Personnel development and training.
 - e. Physical facilities and equipment.
 - f. Records and case handling procedures and coordination, with a review of potential EDP applications.
 - g. Implications for other City agencies of the creation of a consolidated Department of Inspection Services.
 - h. Implications for changes in the City Charter and Administrative Code.
4. A proposed schedule of implementation of the study recommendations.

We estimate that approximately 25 to 30 man-days will be required for data collection, analysis, the preparation of organizational and systems design and the submittal of recommendations. If City staff is not available to perform the work and if G-K is selected for the purpose, the work could be provided at a cost of approximately \$6,000 to \$8,000.

The second phase, that of implementing the program and orienting employees, is logically an in-house undertaking. However, G-K would make its consulting staff available on an as-required basis to assist in this effort. The City staff suggested for this project would optimally include a management analyst familiar with San Jose inspectional needs, organization and performance; an aide or intern capable of gathering and collating data regarding procedures (including work and paper flow) and making analyses of case records; and a project director at a level in the City Manager's office that would be able to command the necessary departmental cooperation.

IMPROVEMENT PLAN # 7

A STUDY OF THE FEASIBILITY OF CREATING A DEPARTMENT OF CENTRAL SERVICES

The reconnaissance study of the various City departments has produced significant support for considering the advisability of grouping certain service and staff functions provided to all or nearly all other departments in a single organizational unit. Objectives to be sought by this reorganization are:

- Grouping of like or complementary activities within a single organizational framework.
- Providing unified management to enhance the coordination of these functions.
- Furnishing independent direction to assure equal treatment of all departments served.
- Removing from existing departments ancillary functions not directly related to departmental missions in order to permit operating units to exercise full potential to meet their primary responsibilities.
- Avoiding the unnecessary creation of multiple independent service units.
- Providing for direct identification of the cost of services by the development of an independent budget.

A Department of Central Services, as we see it prior to an in-depth evaluation, would consist of units or divisions responsible for performing the following functions:

1. Equipment management (we have separately proposed the undertaking of a study to test the feasibility and provide for the consolidation of all or some aspects of functions now performed in the Finance, Public Works, Fire, Parks and Recreation, and Airport Departments).
2. Communications (now a division of the Police Department).
3. Purchasing and warehousing (now units of the Finance and Public Works Departments).
4. Central Services consisting of mail, messenger, printing, duplicating, and photocopy service (performed by several departments).
5. Records management (for which some central responsibility is being exercised in the City Manager and City Clerk Departments).

This report sets forth what we feel to be the salient advantages of such a reorganization. We have also outlined the nature of the inquiries which we believe will be required for each of the functional areas as well as an estimate of the staff and time commitments likely to be needed for completion of the studies.

Potential Advantages Of Creating A Department Of Central Services

Several types of advantages may in our opinion accrue from the creation of a services department. There are probable advantages flowing from the disassociation of certain functions now performed in operating departments. There also are probable advantages to the centralization of certain functions. Finally, there are probable advantages from the placement of such a centralized agency at a somewhat higher level in the City-wide organizational structure.

Equipment Management

We have elsewhere proposed a study to consolidate to the greatest feasible extent the equipment management functions of the City. Doing so will provide an opportunity to eliminate some management and support services duplication; to standardize policies, methods, procedures, staffing, financing, and records; to fully utilize shop facilities and equipment; and to improve the management of priorities.

Assigning all equipment management functions of present operating departments to one of these departments is one option. Reassigning all of these functions to a Department of Central Services appears to us to represent a somewhat more appropriate option. However, both options should be studied.

Disassociating the functions of equipment management completely may not be feasible, but the rationale for attempting this approach is that the primary missions of the respective departments are not related to the maintenance of equipment. Rather they are, for example, to maintain and construct municipal facilities (Public Works), prevent and suppress fires and related emergency conditions (Fire), and perform the planning and control of municipal financing and related transactions (Finance).

Centralization of equipment management functions in the department proposed for study will result in a single management with the benefits of close interrelationships to other related functions, such as communications, purchasing, and warehousing.

The benefits deriving from organizational placement at the level below an Assistant City Manager would include the development of service and purchase priorities which may not be observed by an operating department which may also be using the services it provides to other departments.

Communications

Removing this unit from the police organization is not an undisputed matter. However, the Communications Division of the Police Department does operate as a service agency to all departments by virtue of its broad range of activities. Its service relationship is, however, somewhat blunted when considerations of service requirements and priorities have to filter through the Police Department. Centralizing this division, particularly with equipment management, purchasing and warehousing may enhance the coordination and scheduling of services. Also, the standardization of service and establishment of priorities may become easier to achieve in a centralized department under an Assistant City Manager.

Purchasing and Warehousing

The present separation of these two functions leads to some unnecessary duplication of effort and somewhat lessens the extent of financial controls that can be applied. While such combined functions are frequently organized as a part of a finance department, the physical dispersion of City facilities would suggest that the task of warehousing should not be assigned this department. Moreover, purchasing itself is a largely ministerial function conducted on behalf of other departments according to priorities which may need to be made at a relatively high organizational level but which are carried out only upon clearance from the managerial unit assigned to preaudit for budget control purposes.

An additional advantage to the inclusion of purchasing and warehousing activities in a Department of Central Services may flow from the close relationships that would be established with equipment and communications management.

Mail, Messenger, and Document Reproduction Services

Removal of these service functions from the various departments will reduce a complex and somewhat costly set of procedures (e.g., document reproduction and billings therefore). Also, we see an advantage to operating departments in their being relieved of responsibilities extraneous to their primary missions. The placement of these functions in a central staff agency will also tend to assure the observance or established work priorities, to provide standardized treatment of customer departments, and to promote the flexible and potentially fuller utilization of assigned personnel.

Records Management

Presently forms control, records standardization, storage and retention policies are not receiving sufficient resource support and are not sufficiently centralized. Records management responsibility is divided between the City Clerk's and the City Manager's offices and an interdepartmental committee consisting of the City Attorney, City

Clerk, City Auditor, and assigned staff of the City Manager's office. Involvement of each of these offices may continue to be advisable but administrative responsibility should be placed in one office, with a determination also to be made as to the proper organizational placement of records systems analysis staff. Centralization in the proposed Central Services Department will result in an organizational placement under the general administrative control of the City Manager since most records production is a result of departmental activities over which the City Manager, with few exceptions, has responsibility. The charter-defined responsibilities of the City Clerk for maintaining the official documents of the City would not be disturbed.

Areas Of Inquiry And Analysis Leading To The Creation Of A Department Of Central Services

The following represents an initial rather than exclusive listing. A detailed work plan would have to be prepared if the study is approved.

Equipment Management

1. Organizational and physical location of the administrative and operational functions.
2. Staffing required in the departmental context including the potential allocation of staff to the using departments.
3. Operational arrangements to insure coordination between major users of equipment.
4. Compatibility of accounting and records systems.
5. Planning, programming and budgeting procedures, and the development of systems for assigning priority for services and equipment utilization.
6. Coordinative systems with the other proposed divisions of purchasing and warehousing and communications.
7. Coordination with Public Works for facilities maintenance, with Finance and Personnel and other staff departments for initial and subsequent services.
8. Implications for budgeting, staffing, organization, and operations in the departments presently performing these functions.

The foregoing list excludes that portion of analysis to be undertaken in the course of the equipment management improvement study that we are concurrently recommending.

Communications

1. Implications for staffing required in the new departmental context.
2. Implications for Police Department budget and operations upon transfer of this division.
3. Coordinative systems with other divisions of the proposed department.
4. Compatibility of accounting and records in the departmental context.
5. Planning, programming, and budgeting procedures and the development of systems for assigning priority for services and equipment utilization.
6. Physical facility allocation and operations, particularly the stockroom operations.
7. Operational arrangements with the Police Department and a review of possible modification of other service arrangements following the transfer.

Purchasing and Warehousing

1. Organizational and physical location of the administrative functions.
2. Staffing required in the departmental context including the implications of providing delivery and messenger services.
3. Operational arrangements with using departments with particular attention to the preparation of specifications and providing contract services for equipment.
4. Compatibility of accounting and records systems in the departmental context.
5. Effects on other departments from which the functions are being transferred.

Mail, Messenger, and Document Reproduction Services

1. Organizational and physical location of these activities.
2. Equipment requirements in this division as well as in other departments.
3. Staffing required in the departmental context including provision of services for other divisions of the proposed Central Services Department.
4. Effects on other departments from which the functions are being transferred.

Records Management

1. Organizational and physical location of these functions.
2. Assignment of records systems analysis and its relationship to other systems staff in the City structure.
3. Staffing requirements.
4. Physical facilities and equipment requirements.
5. Implications for existing City departments presently engaged in records management functions.

Time And Cost Implications

The program to undertake the foregoing analyses should have as its major product a series of conclusions and recommendations which will answer the questions as to which of the listed functions can be feasibly transferred to a Department of Central Services, and what form such an organization should take. The conclusions should state the apparent advantages and disadvantages which likely will result from such a reorganization in the context of San Jose City government.

The processes involved in staging the establishment of the department, and making the department operational are not suggested as tasks to be included in this analysis, although such matters should be discussed as a by-product of the study. The staging of the implementation process depends to too great an extent on the timing of proposed changes in the City management structure and the outcome of the proposed equipment management study.

The cost to the City, if G-K were to conduct the study, is estimated at approximately \$13,000 to \$15,000. If it is desired to undertake this as an in-house project with or without G-K project leadership and/or supplemental assistance, we estimate that it will require approximately 60 - 65 man-days of effort to achieve a fully articulated departmental structure (exclusive of final implementation or budgetary details). The staff should consist of one or more experienced management analysts and a person familiar with asset and cost accounting principles and practices.

The time required for this study is estimated at three months; however, this study should follow the completion or near completion of the proposed equipment management study. The timing of the study should be such that the final implementation could be staged as to permit a partial year's experience before a succeeding full fiscal year budget has to be prepared.

The implementation of the plan is primarily an in-house task and it is anticipated that a minimum of consultant assistance would be required.

IMPROVEMENT PLAN # 8

STUDY TO DEVELOP A PROGRAM FOR THE IMPROVED MANAGEMENT OF CITY-OWNED EQUIPMENT

A reconnaissance study conducted in each of the departments now responsible for equipment maintenance has disclosed a number of obstacles to the optimum management of equipment. The existence of separate vehicle and other equipment maintenance operations has led to duplication of effort, inconsistency in both policies and procedures, difficulties in establishing priorities, and funding problems with attendant deficiencies in operational results. A related finding is that a program for financing the maintenance and replacement of equipment needs reinforcement. Steps have been taken to establish a program of equipment replacement through a Vehicle Replacement Fund appropriation, but mechanisms for replenishing that fund other than direct annual appropriations by the City Council need to be improved. Equipment maintenance costs are partly financed by rentals in the Municipal Garage operation and only minimally reimbursed in Public Works.

Our summary of the present equipment management program is as follows:

Missions and Responsibilities: Greater management consistency could be achieved in the programs of the three departments having equipment management responsibility (Finance, Public Works and Fire Departments) resulting in an optimum use of facilities, staff, and equipment and a better return for the large expenditures for equipment.

Management and Direction: There is no one situs of responsibility for the acquisition, maintenance and utilization of equipment. A degree of common management is exercised through the budget preparation and control process but this management needs to be supported by better costs and utilization information.

Physical Facilities, Equipment, Tools and Supplies: Practices and policies regarding facility location and expansion, area security, tool and equipment provision and types of parts and fuel stored and controls on these are not coordinated at this time.

Personnel: The classifications and compensation of the positions in the three departments vary extensively. Since similar work is performed in each of the three vehicle maintenance facilities, it is concluded that standardization of automotive service functions would result in a simplification of classifications with cost, recruitment and personnel utilization benefits.

Acquisition of Equipment: There is no single program for the determination of overall equipment needs, for the coordination of specification development, or the timing of acquisitions with the result that the City may not be receiving optimum value for its equipment expenditures.

Assignment of Vehicles: A rationale for the assignment of vehicles does not exist in all instances and where it exists it has not been continuously evaluated. A careful review of vehicle assignments is likely to result in fewer personal assignments of vehicles, better utilization, and avoidance of possible abuse for personal purposes and a possible reduction in the vehicle fleet. An assignment study was being conducted by the Finance Department under the direction of the Budget Office concurrently with the G-K reconnaissance study.

Servicing and Maintenance Programs: Patterns of maintenance vary from in-house service to service primarily performed by vendors. Storage of parts varies as to quantity, value, variety, control, and location. Fuel types, storage, accounting, and dispensing procedures also vary. Maintenance scheduling for passenger vehicles varies among the three departments. The maintenance schedules for Fire Department equipment could be improved but insufficient staff time is available to follow such a schedule. Instead, nearly all major work is performed on the basis of reported malfunctions or observable wear. The Public Works Equipment Division maintains a very complete maintenance scheduling system for lubrication and other minor servicing requirements but there appear to be no clear standards with respect to major repairs on vehicles which may have high mileages or low turn-in values.

Records Systems: Records systems supporting management decisions need improvement. There needs to be better information for making decisions regarding the replacement of equipment or its retention.

Financing Maintenance: Improved systems of charges or budgetary transfers to support the full cost of maintaining equipment could be developed.

Replacement of Equipment: Although a Vehicle Replacement Fund had been established in the current year's budget consisting of a lump sum allocation of surplus funds from the Municipal Garage and additional funds from City resources, this fund is not at a level that would "buy back" the accumulated depreciation deficits. The improvement of this fund level is receiving the attention of the City Manager.

We would propose a study to develop an improvement program for City equipment management. The assumptions underlying our proposal are as follows:

1. We assume that a study of this type should take as a departure point that all depreciable City equipment (unless treated as depreciable assets of an enterprise fund of the City) should be acquired, owned, managed, and replaced within a single fiscal system.
2. We assume that all depreciable equipment should be under a single control for purposes of acquisition, management, and replacement. Management includes assignment and utilization as well as maintenance and repair. Some exceptions, in terms of responsibility for assignment and utilization may be justified such as for special purpose and emergency vehicles and equipment. These exceptions should be delineated along with the arrangements for inter-departmental cooperation in these matters.
3. We assume that efficiency and effectiveness of operations should be the only basis for justifying more than one facility for equipment management and that the same considerations should be applied to maintenance, repair, and replacement standards, special fiscal procedures, records functions and the assignment of staff, tools, and supplies.

Such a study is proposed to encompass the entire range of equipment management considerations and should result in the following products:

1. A statement of the mission and objectives for equipment management for the City.
2. An analysis and evaluation of the present allocation of functions and a proposal or proposals for modifying this allocation of functions to best meet the management objectives.
3. An analysis, evaluation and proposed program of improvements involving the following elements of operation:
 - a. Organizational placement, management, direction, and coordination.
 - b. Personnel (including preparation or review of position classification structures).
 - c. Physical facilities, supporting equipment, tools and supplies.
 - d. Equipment acquisition, replacement, and financing, including the preparation of a program and schedule for the replacement of City-owned equipment.

- e. Assignment and utilization of equipment, including storage.
 - f. Servicing, maintenance, and repair programs, including the financing thereof. A tentative rental schedule would be prepared, subject to audit at the end of the first year's application.
 - g. Records and cost accounting systems designed to take full advantage of future automatic data processing capabilities of the City.
4. A proposed schedule of implementation of the study recommendations.

We estimate a cost for consultant services of approximately \$16,000 to \$20,000.

If this project were undertaken as an in-house project we estimate that it will require approximately 75 - 85 man-days of effort to achieve a fully designed system (exclusive of any implementation and computer applications work). The staff should consist of an experienced management analyst, one experienced cost analyst, and an aide or intern for records reconstruction and analysis. The time required for this study is estimated at approximately four months.

IMPROVEMENT PLAN # 9

AN IMPROVEMENT PROGRAM FOR THE MANAGEMENT OF RECORDS

The City does not have a formal records management program. This is not an unusual condition in local government since limited management resources must be concerned with problems of higher priority. Yet records systems have a direct bearing on management effectiveness and the development of effective records systems produce substantial benefits.

There is evidence of sound records systems in some departments but in other departments improvements are necessary. The City Manager's office has been engaged in a forms control program but lacks the staff to effectively keep pace with the problem or to expand the program to other aspects of records management. The City Clerk has a sound system for maintaining official city records. A basic Remington Rand filing system was adopted a few years ago but this system does not meet all of the requirements for a comprehensive records program. In summary:

1. The City needs a comprehensive program of records management by which records are generated, processed, retained, filed, reproduced or destroyed.
2. The majority of the departments could improve their internal systems for producing, filing and recovering documents.

The lack of a comprehensive records management program can result in:

1. Duplication of files.
2. Excessive and valuable space devoted to files.
3. Extensive use of copy machines because central referencing of information is not available.
4. Records undergoing gradual destruction because of inadequate storage facilities.
5. "Losses" of documents primarily due to misplacement or illogical filing systems.
6. Losses of information due to the absence of indexing systems to isolate data on multi-informational documents.
7. Potential legal liability or monetary losses due to lack of controls over documents having legal or monetary implications.
8. Extensive duplication of forms containing similar classes of information or continuing use of forms containing useless or insufficient information.

We recommend that an improvement program be undertaken and that such a program should contain these elements:

1. Determining if the records are to be retained or to be destroyed, preparing schedules of retention, and devising filing systems. The completion of this element would involve these steps:
 - a. Working with a representative of each department and preparing a detailed inventory of all records in the departmental files.
 - b. On the basis of the inventory and in cooperation with the department head, developing a retention schedule for each category of record, including the period of time a record would be retained in the office and in any central file location, or in a storage area. The retention period of each record would depend upon its operating necessity, legal requirements, historical significance, and any other vital needs.
 - c. On the basis of the retention schedule, setting aside all materials now in the files which should no longer be there in temporary storage until formal authority for their destruction or removal to the retention area or inactive storage could be obtained.
 - d. Preparing a basic design for the filing system and instructing key staff members of each department in the details of its installation.
 - e. Preparing a detailed manual which would serve as a guide in the operation of this system.
2. The above procedure only determines what records need to be kept on a department-by-department basis. There is of course an overriding consideration concerning whether a central records file and control system needs to be established, wherein records having inter-departmental significance can be readily referenced. This determination could be made concurrent with the conduct of the records inventory in the various departments.
3. Another consideration is the extent to which any records should be microfilmed (or stored by a similar process), or the feasibility of establishing computer files or records indices. Information to answer these questions would also be accumulated concurrently with the files inventory work.

4. Given the design of a records management program, there would then be a question of the organization placement of central control of the program, and of the continuing supervision of the program in the departments. Therefore, a fourth element would consist of developing the organization for records management and the procedures by which controls are exercised.

The work described above should also produce these by-products:

- a. A more accurate determination of the active file space requirements for each department.
- b. A more accurate determination of the dead storage that should be provided.
- c. Organizational and procedural patterns for operating the records management system.
- d. Basic information for the preparation of specifications for records storage and retrieval equipment.
- e. Indications of the extent to which records are being duplicated and the identification of records that may not be needed or, on the other hand, records that should be generated.
- f. Indications of the need for improvement in forms to speed processing and to provide better information.

We do not believe that this improvement plan can be carried out with City staff exclusively. On the other hand, the time-consuming process of classifying records for the purpose of devising retention schedules and filing systems would be least expensively done with City staff. We think consulting services would be best utilized to:

1. Devise a specific work plan for each department.
2. Provide orientation training to department staff assigned to the project.
3. Evaluate document classifications and prepare a preliminary record retention schedule and filing scheme for management approval.
4. Provide guidelines for the development by City staff of a records procedures manual.

5. Recommend organization and procedures for records management structure.
6. Provide guidelines for the elimination of duplicate or obsolete forms or the revision or design of new forms.
7. Prepare basic specifications for filing or automated record storage equipment and computer indexing systems.

We estimate this consultant work to involve approximately 30 man-days at a cost of approximately \$6,000 to \$8,000. City staff time, in the aggregate is estimated at approximately 175 man-days exclusive of actual forms design and the development of forms processing procedures.

IMPROVEMENT PLAN # 10

STUDY OF THE FEASIBILITY OF CONSOLIDATING THE CITY AND COUNTY CIVIL DEFENSE ORGANIZATIONS

At the inception of the reconnaissance study, we were requested to explore the probable value of conducting a study evaluating the feasibility of consolidating City and County operations. We do not know what the County's position would be regarding such a study but from our observation of the City's operation and considering the benefits to be obtained from a County-wide (or even a regional) civil defense system, we believe that a consolidation study would produce a program for more effective preparedness with the potential of reduced cost to the City. The City and County programs are not identical at present in either scope or scale; however, there are certainly overlapping areas of administrative and operational concern. Even though the City contains a large part of the population and area of the County, a civil defense program would appear to be more appropriately administered on a County-wide basis primarily because disaster does not recognize municipal boundaries.

The City's financial input to civil defense is about \$40,000 annually. The value received from this level of expenditure is not easy to quantify since it is difficult to determine how "prepared" is "prepared." To what extent this expenditure could be reduced under a consolidated County-wide organization is not known at this time but we think it worth some investigation.

A feasibility study, if conducted, should address itself to at least these considerations (we assume that the cooperation of the County and other cities will be obtained):

1. Identification of what consists of a "minimum" level of protection against natural and man-made disaster for the City of San Jose.
2. The extent to which this might be obtained under a County-City organization and operations.
3. Determination of the fair contribution of the City to a defined and consolidated preparedness level.
4. The probable organization structure of a City-County effort and the implications of this for the present City organization and staff.
5. The administrative and operational split of responsibilities between the City and County.
6. The effect, if any, of a City-County program on the programs of other cities in the County.

We estimate that approximately 25 man-days of work will be required and one management analyst would be the staff requirement. The cost for consulting services if in-house staff is not available would be approximately \$5,000 to \$8,000.

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